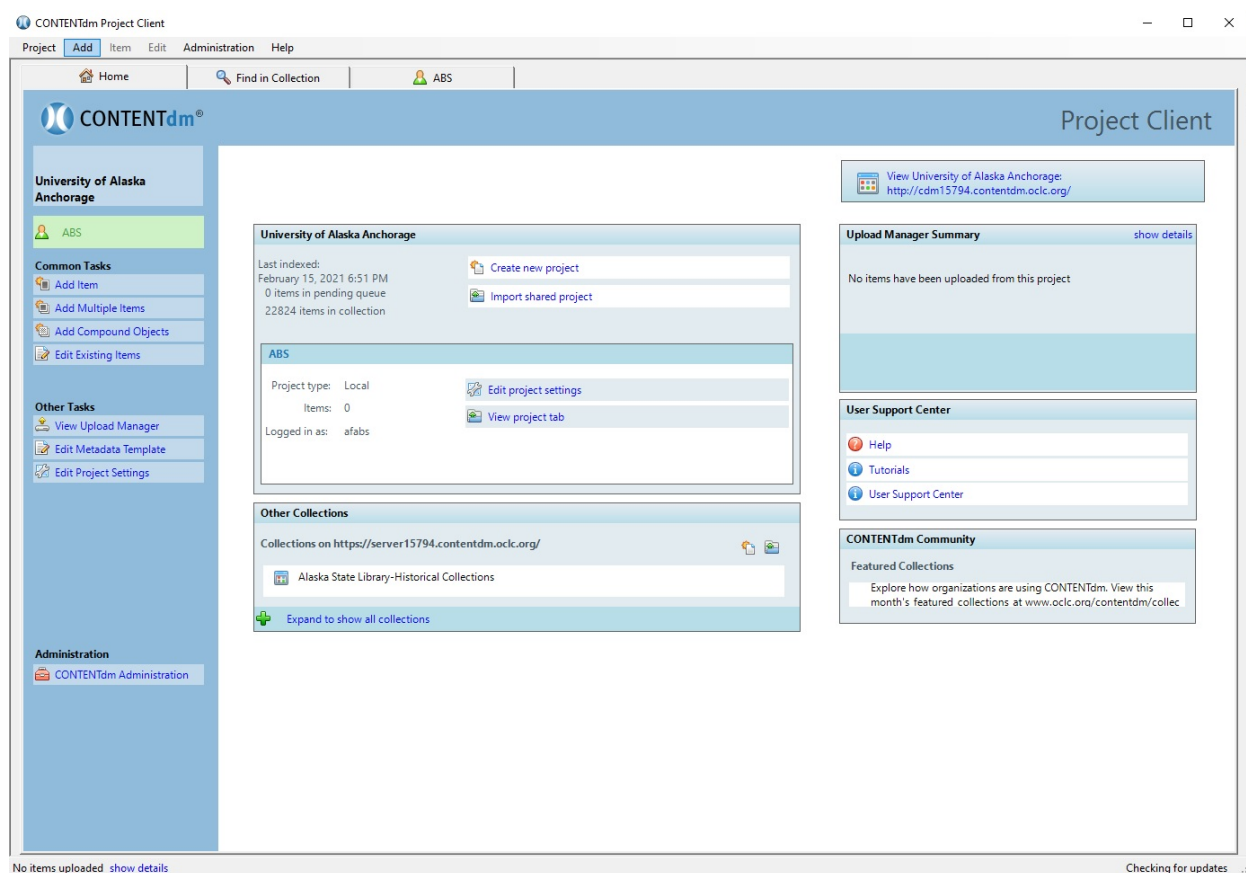


Getting started with the ContentDM Project Client part 4: Setting up your project

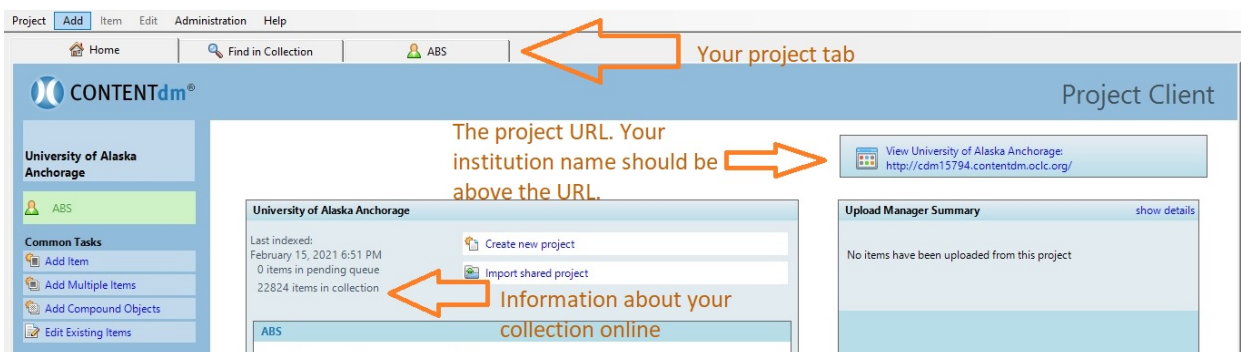
If you've done everything outlined in Parts 1-3, you now have a blank project! And when you pull up the Project Client, your screen will look like this:



There's still a few steps before you can start applying metadata to the items you want to upload. First, make sure you know where your files are. If you're going to do one item at a time, you can do that. But if you want to work on multiple items at once, and this is usually the most efficient way of doing things especially with items that may have repetitive metadata like date spans, or locations, collection names, creators, or so forth, you should put all of the files you want to work

on in a single folder so you can pull them all into your project in one step. If you forget some, or need to swap out a file for some reason, you can do that. More about how to do that in a bit. For more information about what your digitized files should look like, see the File Types and Formats guide.

But first, let's take a closer look at some elements of what's on this screen. Here's the top of it.

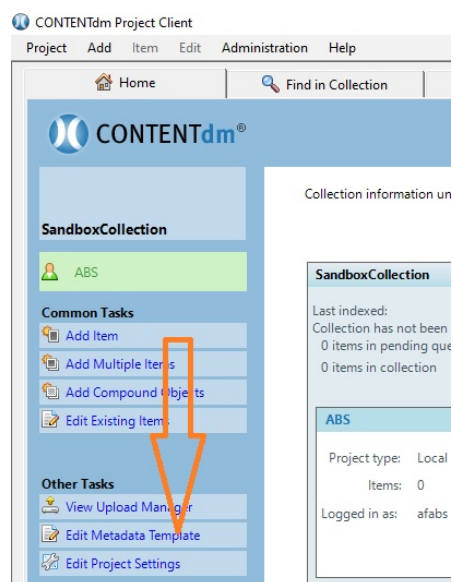


The arrows in the graphic above show you some of the basics about your project as you set it up. At the top, there's a tab for your project (in this case, I named mine ABS). To the right, you can see your institution name and the project administrative URL (that's actually the URL that sits behind vilda.alaska.edu and works. It's just harder to remember.) And in the middle you can see your institution name and information about what you have uploaded, from what is still awaiting administrative approval to how many items you currently have online. You're seeing UAA's information in this screenshot.

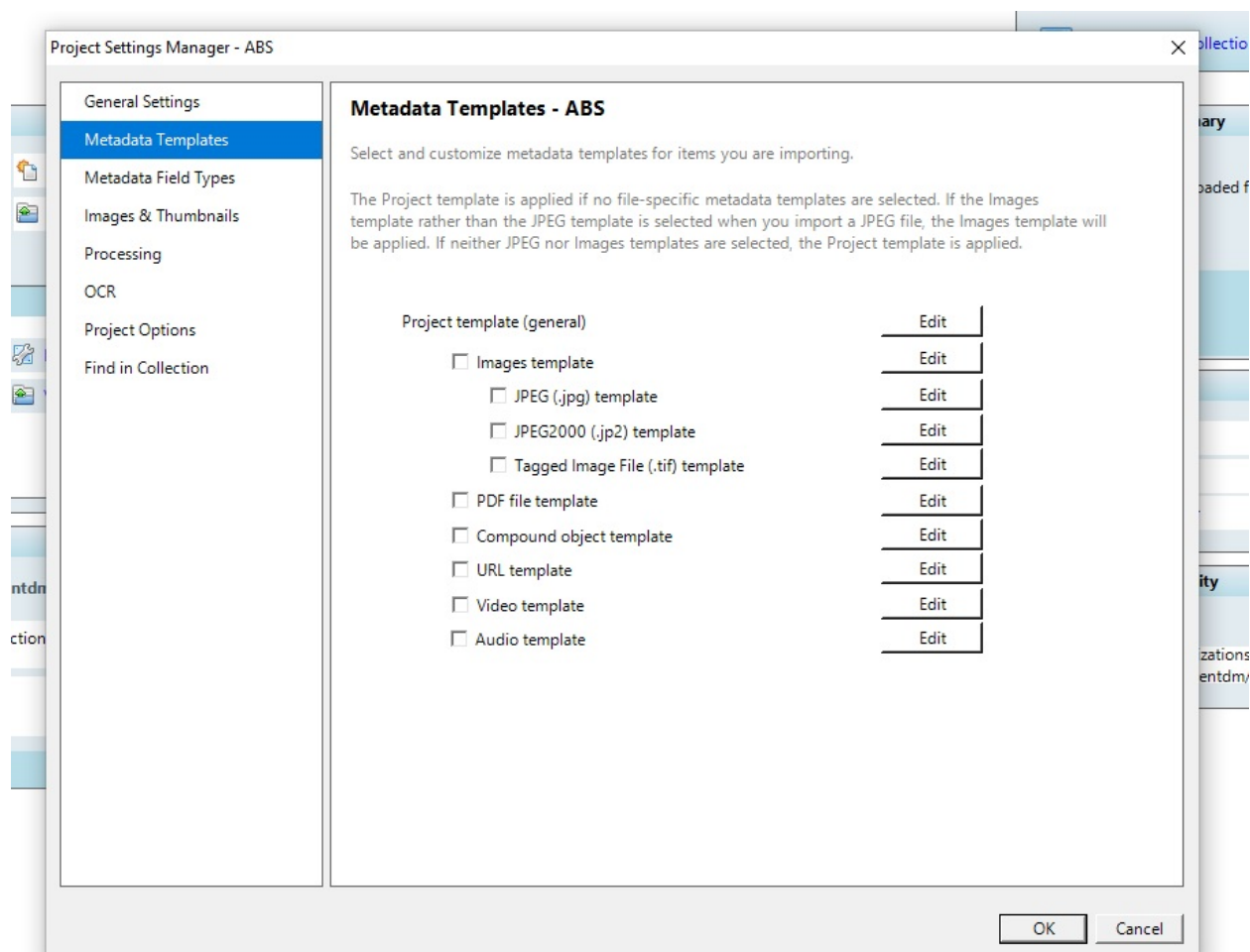
The first thing we're going to do is set up a metadata template and create a band. For more information about the requirements for how your metadata will be structured and written, see the Metadata Guidelines.

The metadata template allows you, when you add files to your project, to automatically fill in some of the metadata fields that will be the same across all of your fields. While you can choose to use some or all of these or not, there's a few you need to use. We'll go through those first.

Click on Edit Metadata Template as shown in the graphic below. It's on the left hand blue column under Other Tasks.

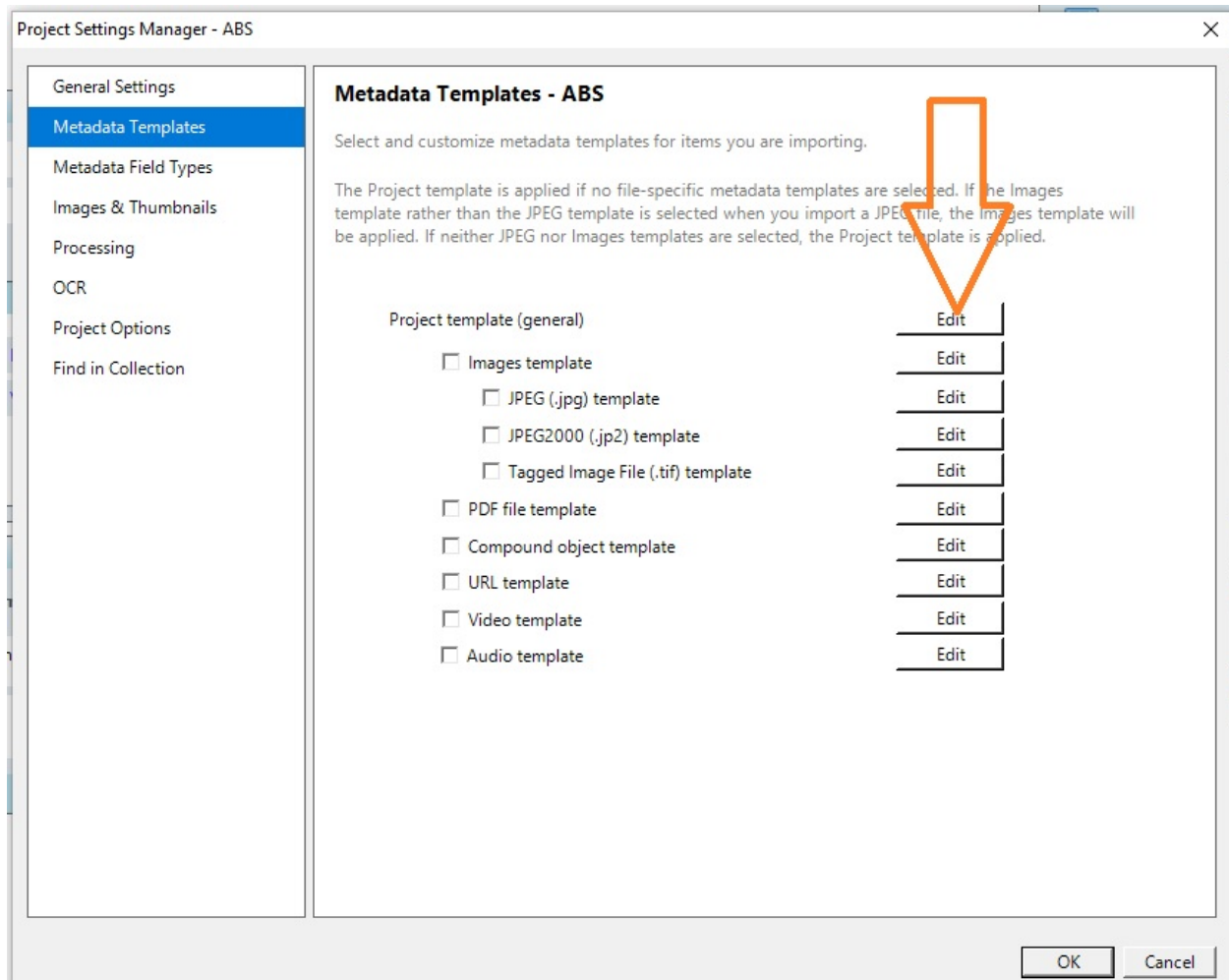


You'll get a pop-up window that looks like this:

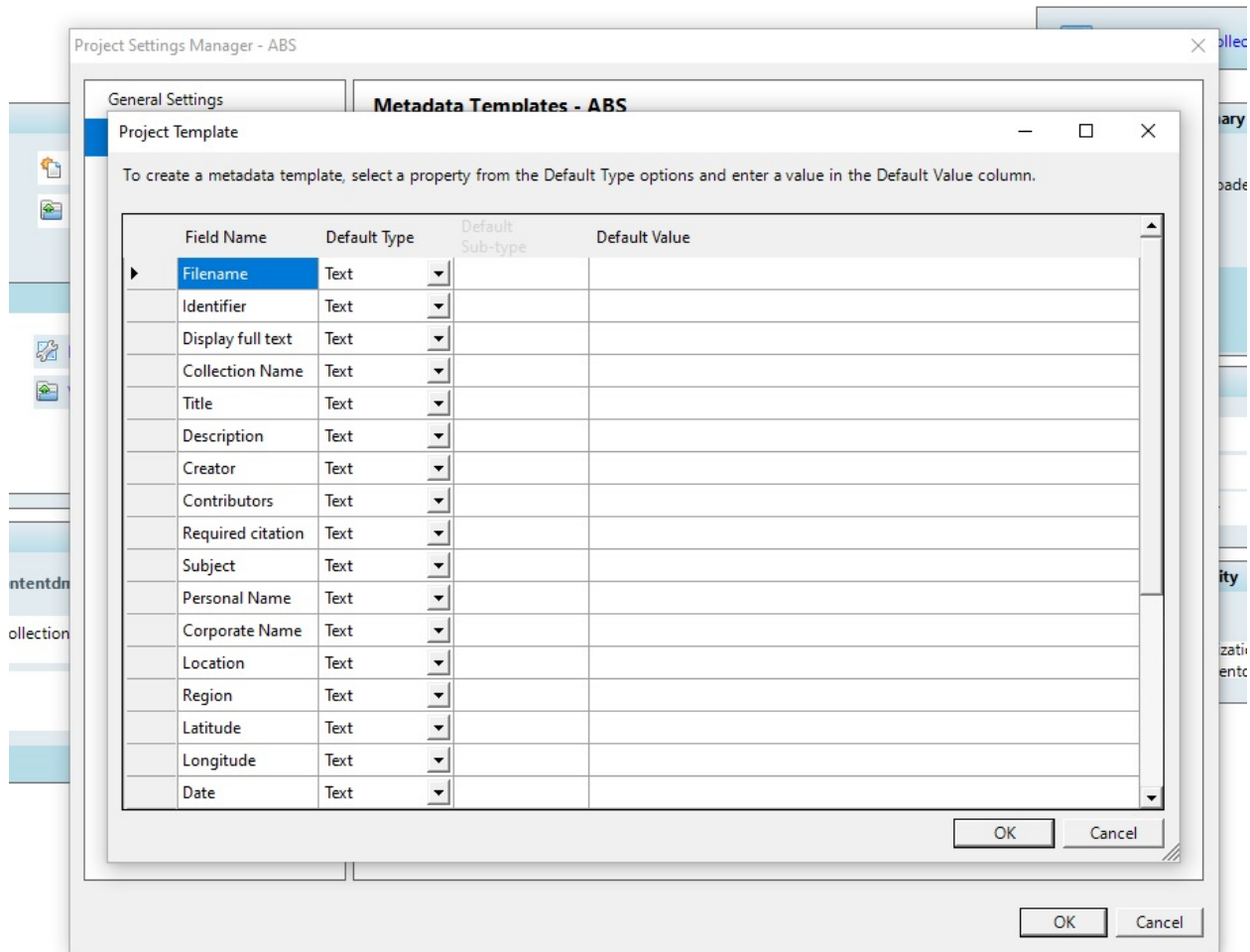


This screen has at least two options you'll want to work with. The first is the Metadata Template. But notice that there's an Images & Thumbnails listing on the left side menu: that's where you'll set up the band for your images that you're uploading. More on that later.

Click on the Edit button to the right of Project template (general).

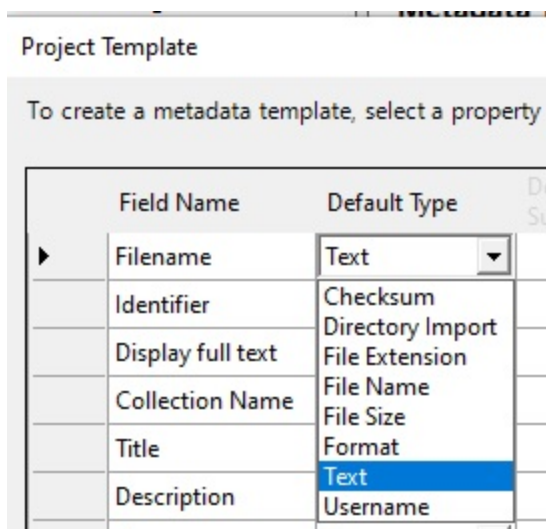


This will pull up yet another window on top of the general metadata templates window.

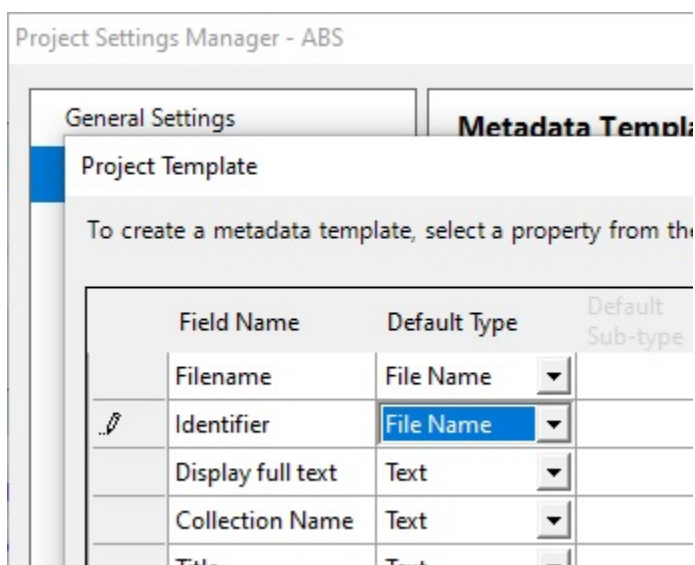


This has a list of all of your metadata fields. You will need to use the scroll bar on the right side of this window to see them all. You can see from here that you can pre-set content for every metadata field.

But first, let's look at the required fields and one you should leave alone. These are the Filename field, the Identifier field, and the Title field. The Title field is one you should leave alone. For some reason, ContentDM auto-imports your file name into this field (no matter what the default type is set to) and since it could affect your file import to change this particular field, you'll want to leave it as is. But with both the Filename field and the Identifier field, click on the Default Type dropdown and choose File Name. (see graphic below). Please note: this assumes that your files have been named with the unique identifier for each item which will display on the website. If your identifiers and file names are not the same, do not pre-set the Identifier field to the file name because then you'll just have to erase the content in that field and write over it, when you get to applying the metadata for each image.



It should look like this when you're done:



Those are the two you should always make sure are set up. Even if you keep re-using the same project you set up, when opening your empty project to load in some new files, you may want to quickly check that your metadata template is still set up. On a few occasions I've found that some of these fields have re-set themselves to be blank. Hopefully this won't ever happen to you, but if it does, it's a relatively easy fix that will be covered in Part 5: Adding Files to a Project.

Now for the optional templated fields that are going to be the ones you're most likely to use. If you scroll down to the bottom of the field listing, you'll see:

Project Template

To create a metadata template, select a property from the Default Type options and enter a value in the Default Value column.

Field Name	Default Type	Default Sub-type	Default Value
Subject	Text		
Personal Name	Text		
Corporate Name	Text		
Location	Text		
Region	Text		
Latitude	Text		
Longitude	Text		
Date	Text		
Date searchable	Date		
Type	Text		
Related Materials	Text		
Language	Text		
Rights	Text		
Ordering and Use	Text		
Holding Instituti...	Text		
Date Digitized	Text		
Metadata compl...	Text		

OK Cancel

The two fields you may want to auto-fill here are the Ordering and Use link, and the Holding Institution field. The information for these fields should be the same across every single item your institution is posting online. Please check with your local project administrator to make sure you have the agreed-upon language for these fields. You'll keep the Default Type as text. The text you want to use will go into the Default Value field, as shown below.

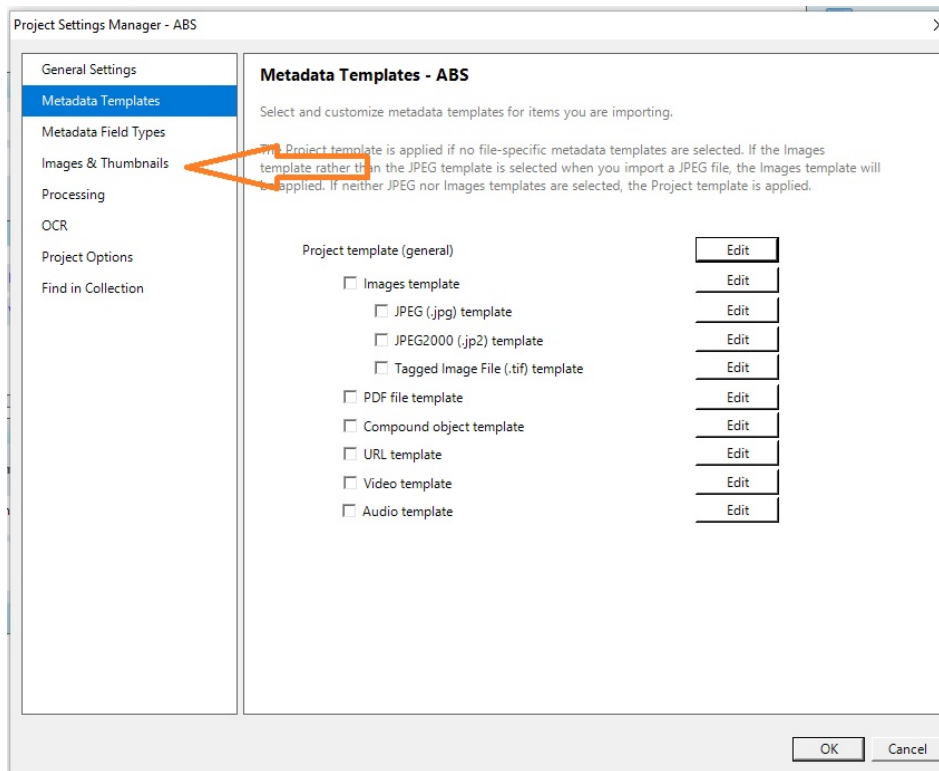
Related Materials	Text		
Language	Text		
Rights	Text		
Ordering and Use	Text		https://oursitelandingpageforrequests.org
Holding Instituti...	Text		Institution name, address, phone number, mailto:ouremail@domain.org
Date Digitized	Text		
Metadata compl...	Text		

If you have only one person working in a project, you could also fill in the Metadata Completed By field. If you choose to pre-set other fields that may vary from group of items to group of items, always make sure before you bring in new items to the project that the text in these fields is still applicable. Also be sure that all other default text for each field complies with the Metadata Guidelines.

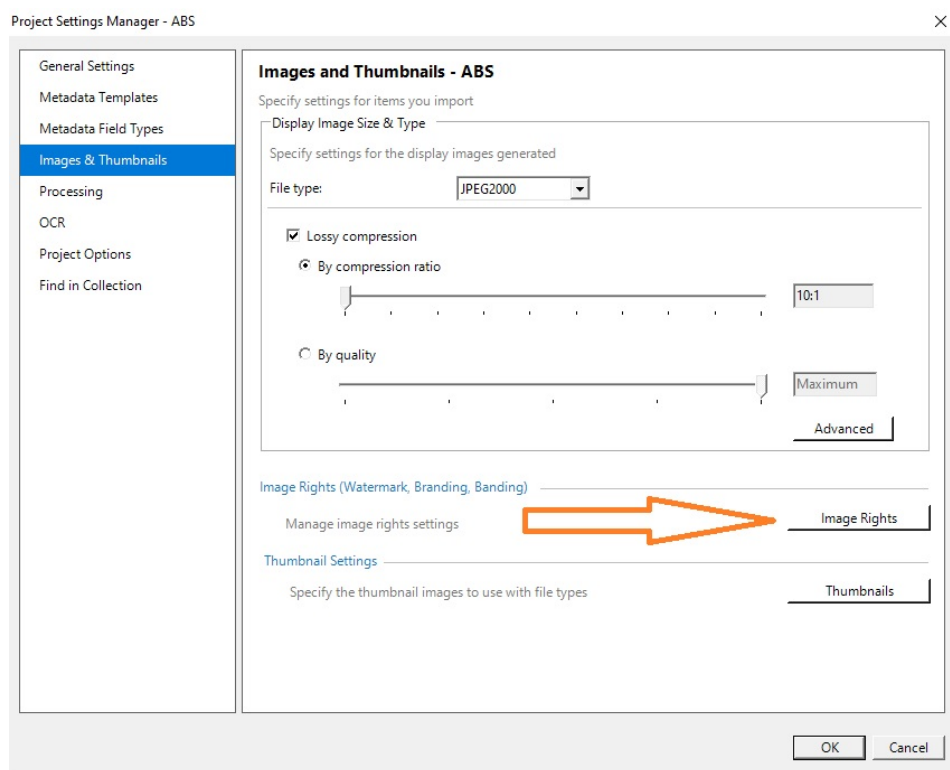
Once that's entered, click on the OK button at the bottom of the pop-up window.

You'll be taken back out to the general Metadata Templates screen. Now it's time to set up your band. The band is attached by the Project Client to every image you upload. Please note that sometimes after you've uploaded items and are getting ready to upload more, the band may not auto-apply. Hopefully this won't ever happen to you, but if it does, it's a relatively easy fix that will be covered in Part 5: Adding Files to a Project.

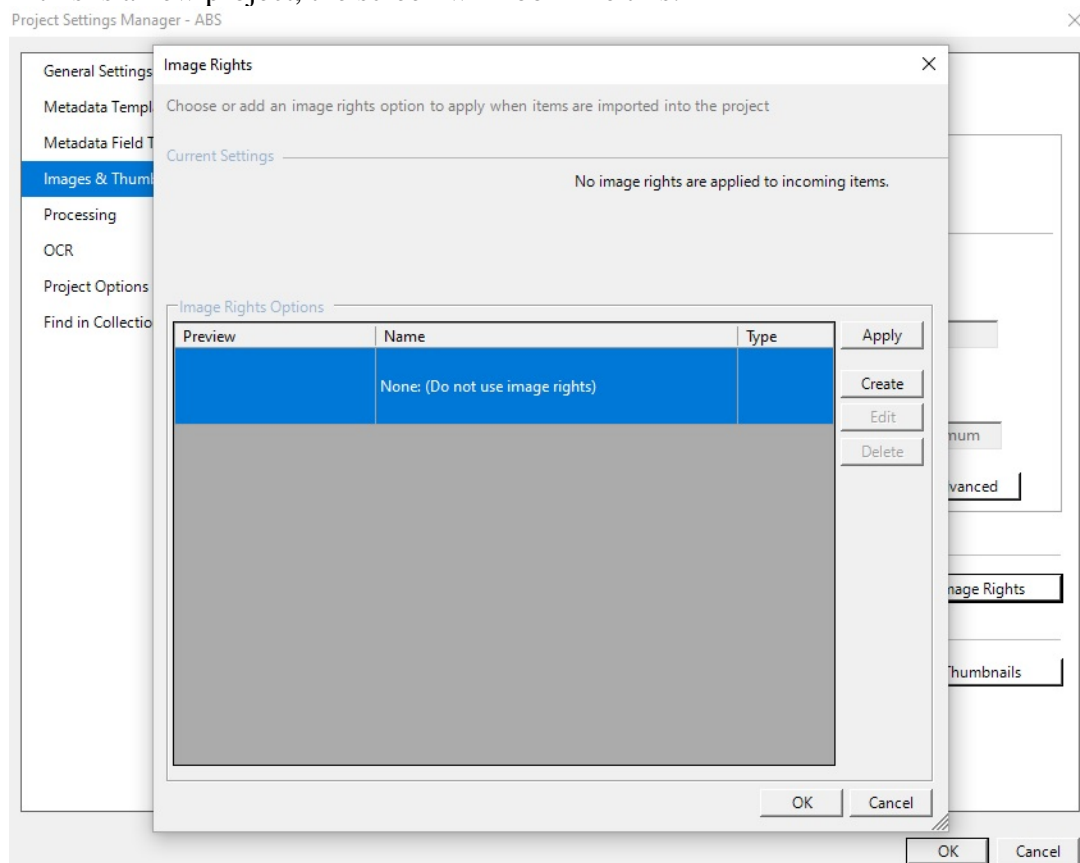
Click on the Images and Thumbnails option on the left menu.



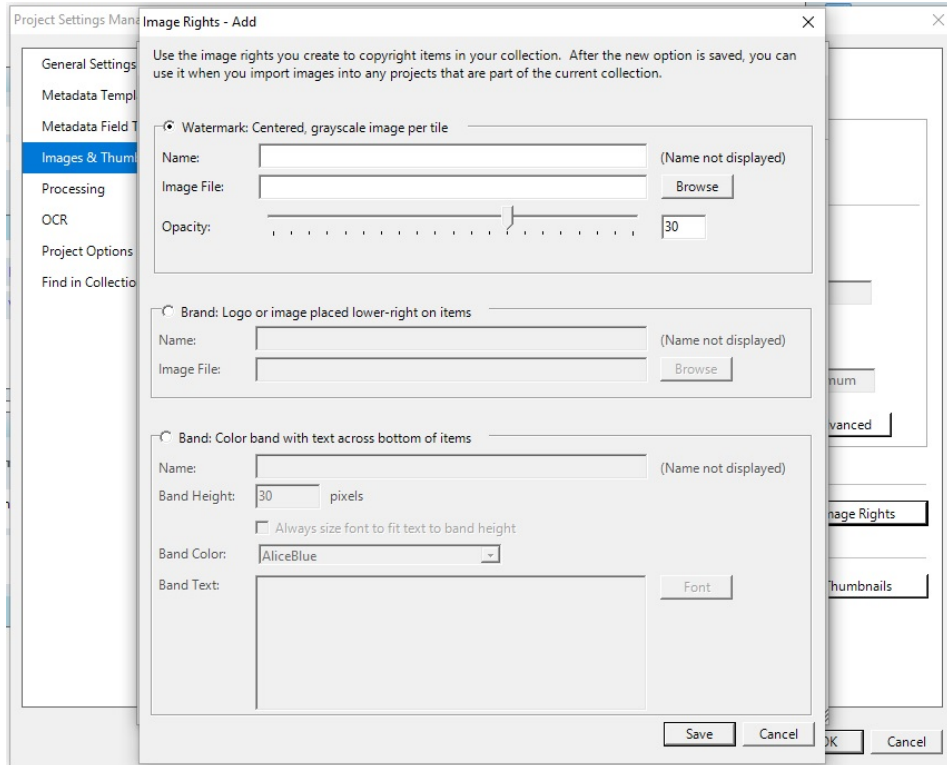
You'll be taken to this screen. Click on the Image Rights button.



If this is a new project, the screen will look like this:



Click on the Create button on the right. You'll get this screen.



Below are arrows pointing to the items you need to select, change, write. First you need to select the button next to Band (as opposed to Watermark or Brand.) You can't leave the Name field blank. You could give it a meaningful name if you had multiple bands and needed an easy way to remember which is which, but you most likely will not, so name it whatever you like. Change the Band Height to 20 pixels. Change the Band Color to Dark Grey. (It's a little way down that list.) Click on the Font button.

Image Rights - Add [X]

Use the image rights you create to copyright items in your collection. After the new option is saved, you can use it when you import images into any projects that are part of the current collection.

☐ Watermark: Centered, grayscale image per tile

Name: (Name not displayed)

Image File:

Opacity: 30

☐ Brand: Logo or image placed lower-right on items

Name: (Name not displayed)

Image File:

☒ Band: Color band with text across bottom of items

Name: (Name not displayed)

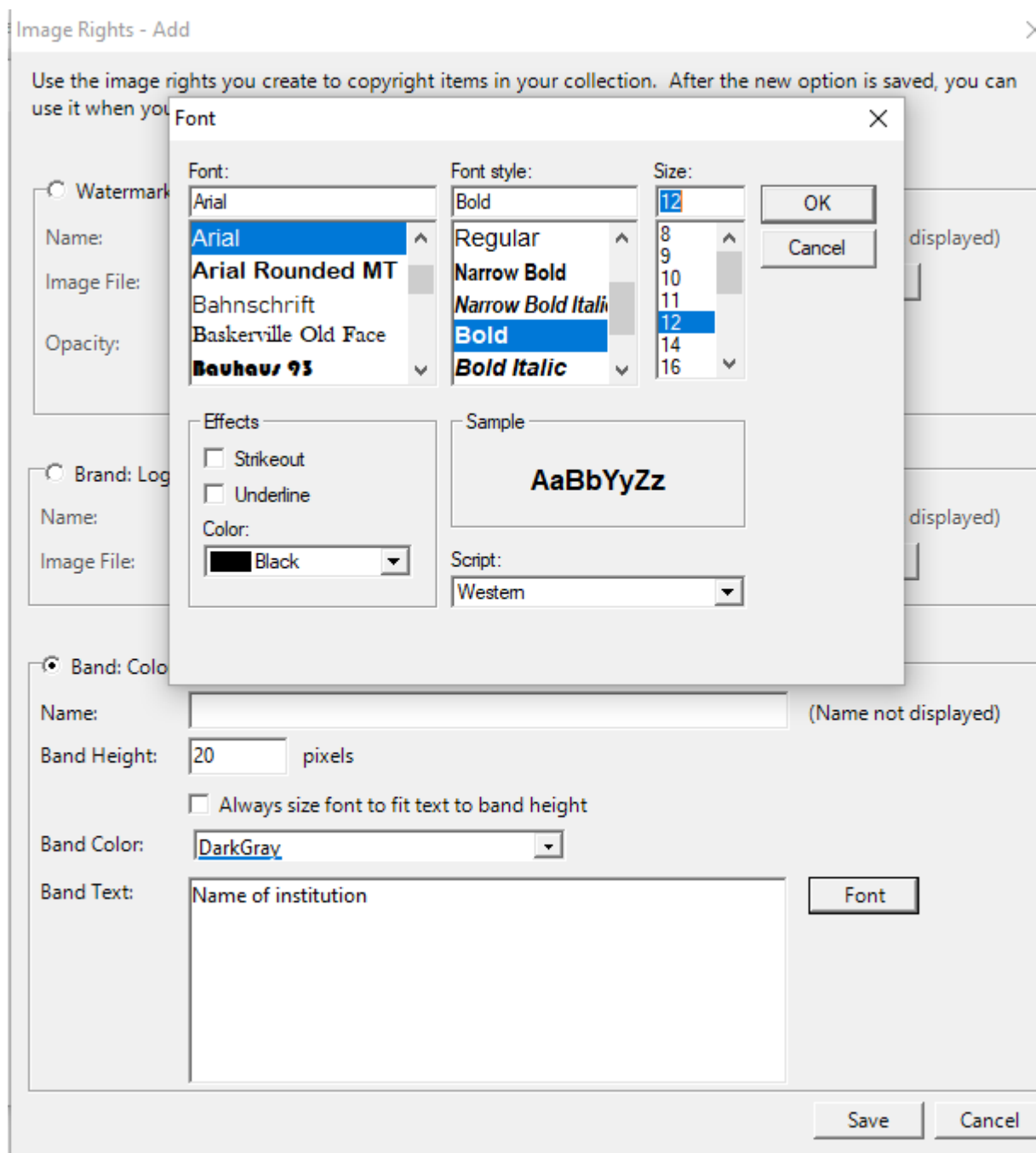
Band Height: pixels

☐ Always size font to fit text to band height

Band Color:

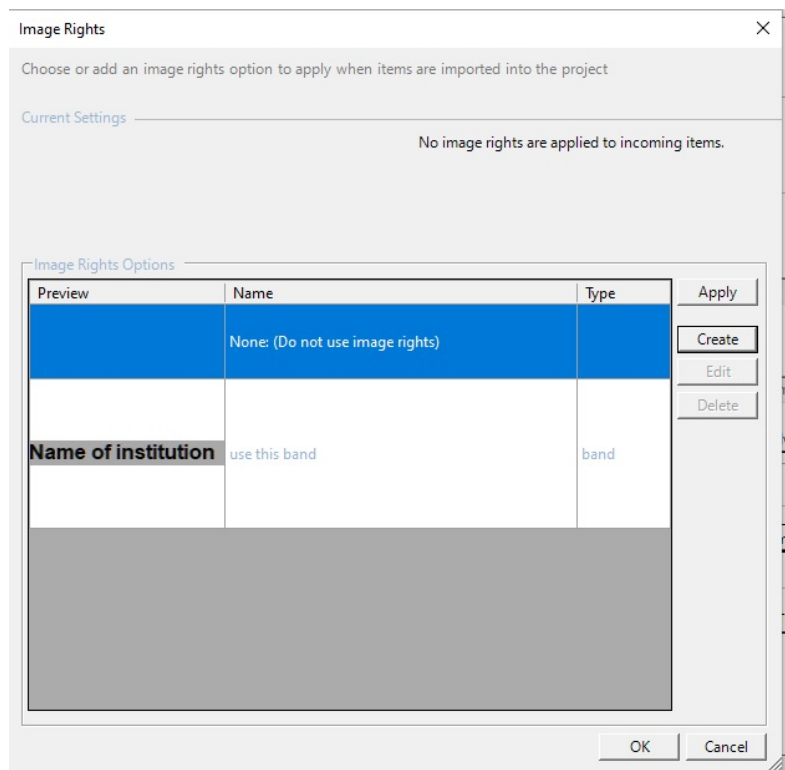
Band Text:

In the font selection window (below), choose Font = Arial, Font style = Bold, and Size = 12. The rest should stay as shown below. Click okay.

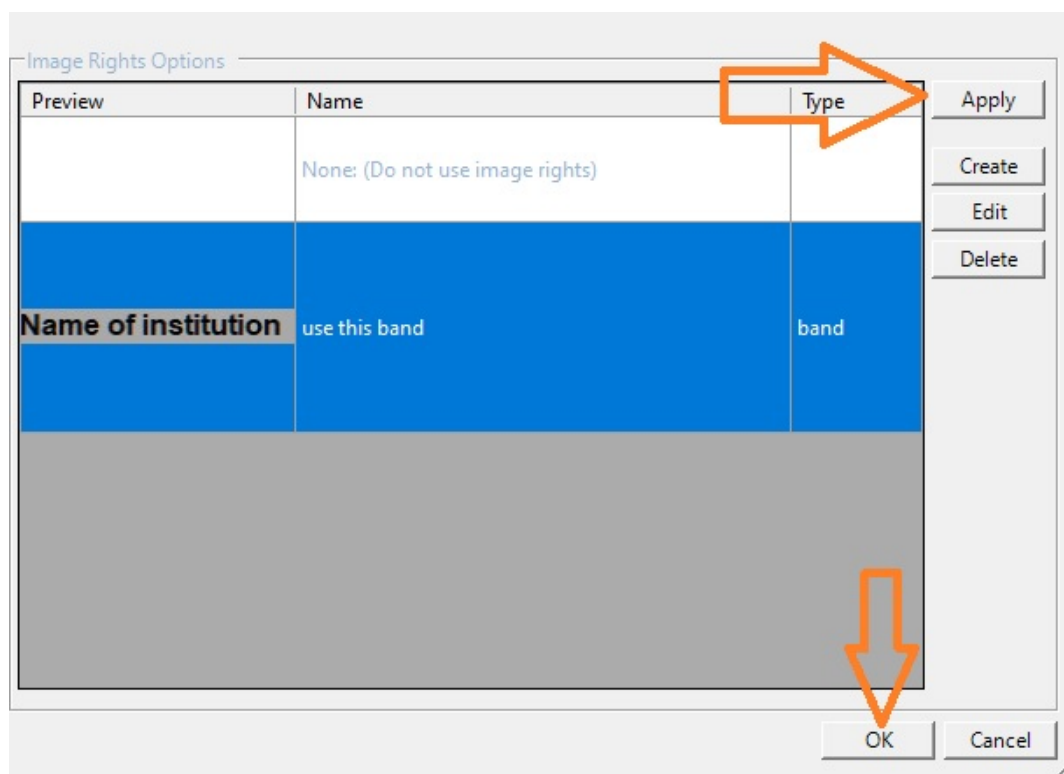


You'll be taken back out to the Image Rights page, where the Band Text will probably be displaying in bold font now. Click on the Save button at the bottom.

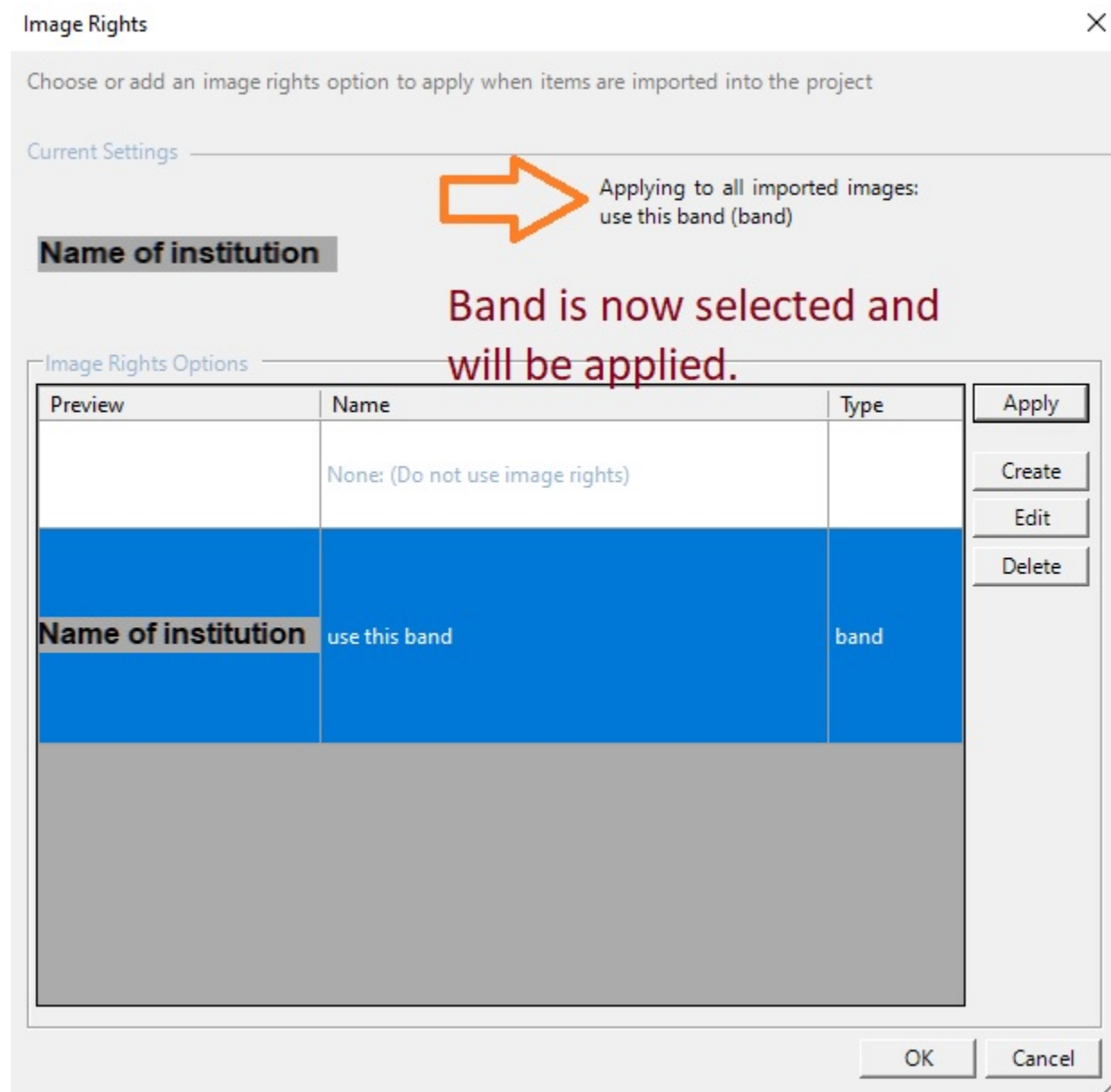
This will take you out to the Image Rights pop-up window, where you'll now see your band listed in the options. (You'll see I named mine "use this band.")



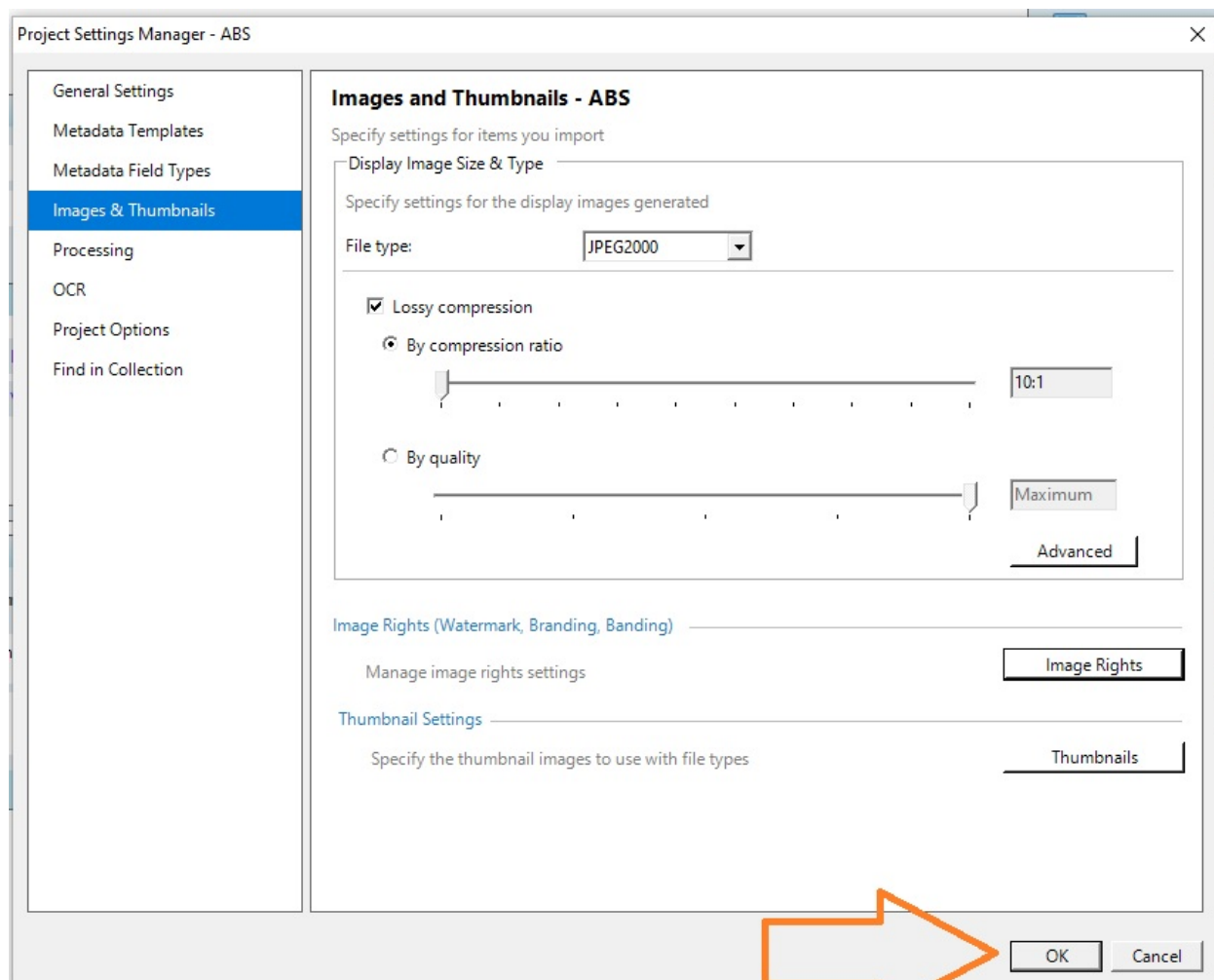
Click on the band you just created so it is highlighted in blue. Then click on Apply. And Click on OK.



After you've clicked on Apply but before you click on OK, you may notice that the text about the Band listings now indicates that you've selected this band.



This will take you back out to the Project Settings Manager pop-up window. Click on the Okay button at the bottom right to close out.



You're now ready for Part 5: Adding Files to a Project.